

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	26,172.40	206.00	0.79	-0.01	10.23
BSE Sensex	85,567.48	638.12	0.75	-0.09	8.99
Bank Nifty	59,304.00	234.8	0.40	-0.63	16.14
Nifty Midcap 100	60,815.25	505.10	0.84	-0.37	5.86
Nifty Smallcap 100	17,593.05	202.7	1.17	-1.58	-7.21
S&P 500	6,878.49	43.99	0.64	0.97	17.21
DJIA	48,362.68	227.79	0.47	2.27	14.08
Nasdaq 100	25,461.70	115.52	0.46	0.47	21.39
Nikkei 225	50,402.39	895.18	1.81	2.23	28.23
Hang Seng	25,801.77	111.24	0.43	-0.89	31.49
Shanghai Com	3,917.36	26.92	0.69	0.09	20.07

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,172.40	59,304.00
Support	26,030 & 25,880	59,100 & 58,850
Resistance	26,260 & 26,350	59,550 & 59,760

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,713.52	11,170.86	-457.34
DII Cash Market	15,295.92	11,237.70	4,058.22

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	934.85	3.68	31894.46
Trent	4206.80	3.56	1316.45
Wipro	272.67	3.11	14651.31
Infosys	1689.60	3.11	23098.92
Bharti Airtel	2147.60	2.38	7670.85
Top Losers			
SBI	974.30	-0.61	5959.04
HDFC Life	761.80	-0.61	767.83
Kotak Mahindra	2149.70	-0.45	1808.23
TATA Cons. Prod	1178.80	-0.44	670.31
SBI Life Insura	2022.30	-0.30	526.89

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.01	2.53	-18.35
WTI (USD/bbl)	57.94	2.51	-20.74
Gold Spot (USD/t oz.)	4,433.67	2.18	66.81
USD/INR	89.65	0.00	4.68
10 Year G-Sec India	6.668	1.00	-1.67
US 10 Year Bond	4.153	-0.24	-9.10

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity indices climbed broadly on Monday, as the likelihood of foreign investors turning buyers following an intense selloff earlier this month fuelled a stock comeback. The GIFT Nifty was trading above 26,200 early on Tuesday. The futures contract based on the benchmark Nifty 50 rose 0.07% at 26,230.5 as of 6:45 am indicating a positive start for the Indian markets.

Global

US stocks closed higher to kick off the holiday-shortened trading week, buoyed partly by a continued rebound by technology stocks in a broad advance that saw gains among almost all of the 11 S&P 500 sectors.

Japan's Nikkei share average jumped for a second day on Monday, buoyed by a weaker yen and renewed enthusiasm over artificial intelligence (AI) investments.

China and Hong Kong stocks rose on Monday, buoyed by signs of continued money inflows, and the creation of a free trade port in tropical island Hainan.

Commodities & Currency :

The Indian rupee dipped snapping a three-session winning streak, as dollar demand from domestic enterprises and the non-deliverable futures market undermined an intervention-led advance, albeit the currency remained above 90 per dollar.

Gold jumped more than 2% to a record high on Monday, powered by safe-haven flows as US-Venezuela tensions flared, while silver also touched an all-time peak.

News:

New Zealand and India said on Monday they had concluded talks on a free trade deal that would help to double bilateral trade over the next five years.

India's Fortis Healthcare said it will acquire People Tree Hospital in Yeshwantpur, Bengaluru for 4.3 billion rupees (\$48.01 million), strengthening its position in the South Indian healthcare market.

India's infrastructure output rose 1.8% year-on-year in November led by strong cement and steel production, government data showed on Monday.

The rupee is likely to stay supported this week by firm Reserve Bank of India intervention, tempering its negative bias, while bond yields will track the central bank moves and offshore flows.

The Reserve Bank of India sold a net \$11.88 billion in the foreign exchange market in October, data released on Monday showed, reflecting the central bank's efforts to support the rupee.

The Indian economy continued to hold up its strong growth momentum in November, helped by private and urban consumption demand, the Reserve Bank of India said in its monthly bulletin on Monday.

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